

**INFORMATION**  
**October 24, 2003**

**HIGHER EDUCATIONAL AIDS BOARD**

**BOARD REPORT #04-06**

**2002-2003 ANNUAL ACADEMIC EXCELLENCE  
SCHOLARSHIP PROGRAM REPORT**



State of Wisconsin  
Higher Educational Aids Board

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Governor

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July 30, 2003

The Honorable Alberta Darling, Co-Chair  
Joint Committee on Finance  
State Capitol, Room 317 East  
Madison WI 53702

The Honorable Dean Kaufert, Co-Chair  
Joint Committee on Finance  
State Capitol Room 308 East  
Madison WI 53702

Dear Senator Darling and Representative Kaufert:

Enclosed is the 2002-2003 Annual Status Report for the Academic Excellence Scholarship Program. Submission of this report is in compliance with Section 39.41 (7) of the Statutes which requires a yearly report regarding the Academic Excellence Scholarship Program. In addition to presenting final 2002-2003 data, preliminary data is included for the freshmen who will enroll in 2003-2004 as the fourteenth class of scholars since the inception of the program.

If you have any questions about this report or about the Academic Excellence Scholarship Program, please feel free to contact me by phone at 267-2944 or by e-mail at [sherrie.nelson@heab.state.wi.us](mailto:sherrie.nelson@heab.state.wi.us).

Sincerely,

Sherrie Nelson  
Acting Administrator

CC: Members of the Joint Committee on Finance  
Legislative Fiscal Bureau  
Department of Administration  
Office of the Governor

**2002-2003**  
**ACADEMIC EXCELLENCE SCHOLARSHIP PROGRAM**  
**Annual Status Report**

2002-2003 saw the continued increase in numbers of freshmen using the Academic Excellence Scholarship (AES). In this year, 789 freshmen enrolled in a Wisconsin post secondary institution and used \$862, 814 in AES funds, at an average of \$1,094. In 2001-2002, 777 freshmen used \$854,606, at an average of \$1,100. Please note that \$1,125 of the \$2,250 per student scholarship is funded by the Higher Educational Aids Board (HEAB) AES appropriation. The college or university that the recipient attends funds the other \$1,125.

In 2002-2003, HEAB staff continued to seek ways to make more efficient the process of awarding and funding students eligible for the AES. The forms and letters sent to high schools and students were consolidated, with more information sent in fewer mailings. Discussions were held with personnel at the Department of Public Instruction to obtain high school enrollment data from DPI, rather than through a HEAB survey. Personnel at both agencies developed a plan to cooperate in obtaining and sharing enrollment data. HEAB provided informational letters about the AES which DPI will include in its mailing to high schools. It is hoped that the additional information will encourage high schools to return their enrollment reports in a timely manner, and that it will aid in HEAB's continuing efforts to seek out and contact every high school possible about the availability of the AES.

Information management specialists continue to upgrade and streamline the computer programs that support the AES program. Increasingly, reports to and from colleges are sent electronically. Additional responsibilities for HEAB, such as verifying the Selective Service Administration status of all freshman male recipients of the AES, may also become more automated in the future.

Seven tables are attached, showing final figures for 2002-2003, along with some preliminary data for 2003-2004.

- Tables I, II, and III present enrollment by sector (University of Wisconsin, Wisconsin Technical Colleges, and Wisconsin Independent Colleges and Universities.) These figures represent the students who received AES program funds.
- Table IV presents a grand total for the three sectors.
- Tables V and VI present financial need related information by sector. The average contribution and adjusted gross income (AGI) figures are for AES program recipients who also received other State of Wisconsin funded financial assistance (Wisconsin Higher Education Grant, Wisconsin Tuition Grant, Talent Incentive Program Grand And Wisconsin Indian Grant.) The figures in the HEAB AES Amount column are the scholarship funds administered by HEAB. This amount is matched by the school that the student attends in order to fully fund the scholarship award.
- Table VII presents general information such as the number of scholars using their award to attend a Wisconsin college or university.
- Table VIII gives preliminary information for 2003-2004 freshmen.

<b>Table I</b>						
<b>ACADEMIC EXCELLENCE SCHOLARS UNIVERSITY OF WISCONSIN INSTITUTIONS 2002-2003 ACADEMIC YEAR</b>						
	Freshman Scholars	Sophomore Scholars	Junior Scholars	Senior Scholars	Total Scholars	Scholarship Amount
Madison	411	382	342	334	1,469	1,611,000
Milwaukee	28	17	33	25	103	111,377
Green Bay	12	21	19	8	60	66,938
Parkside	7	4	4	3	18	19,125
UW Colleges	11	5	1	0	17	16,313
Eau Claire	40	38	36	30	144	157,502
La Crosse	38	37	29	26	130	142,310
Oshkosh	20	15	12	19	66	71,999
Platteville	15	17	18	26	76	81,000
River Falls	15	15	7	17	54	55,688
Stevens Point	23	23	24	35	105	114,188
Stout	4	7	9	13	33	33,750
Superior	2	2	4	4	12	13,500
Whitewater	15	8	16	18	57	60,188
<b>UW Total</b>	<b>641</b>	<b>591</b>	<b>554</b>	<b>558</b>	<b>2,344</b>	<b>2,554,878</b>

<b>Table II</b>						
<b>ACADEMIC EXCELLENCE SCHOLARS WISCONSIN TECHNICAL COLLEGES 2002-2003 ACADEMIC YEAR</b>						
	Freshman Scholars	Sophomore Scholars	Junior Scholars	Senior Scholars	Total Scholars	Scholarship Amount
Fox Valley	1	1			2	2,200
Chippewa Valley		1			1	1,125
Southwest WI	1				1	563
Northeast WI	1				1	1,125
Western WI		1		1	2	2,217
Madison Area	2		1		3	2,063
Milwaukee Area	6		1		7	4,816
North Central WI	2	1			3	2,812
Blackhawk	1				1	1,125
WI Indianhead	3				3	2,544
<b>WTCS Total</b>	<b>17</b>	<b>4</b>	<b>2</b>	<b>1</b>	<b>24</b>	<b>20,590</b>
<b>UW &amp; WTCS Total</b>	<b>658</b>	<b>595</b>	<b>556</b>	<b>559</b>	<b>2,368</b>	<b>2,575,468</b>

Note: Tables I and II show actual net spent amounts and the scholars with those net spent amounts.

<b>Table III</b>						
<b>ACADEMIC EXCELLENCE SCHOLARS INDEPENDENT COLLEGES AND UNIVERSITIES 2002-2003 ACADEMIC YEAR</b>						
	Freshman Scholars	Sophomore Scholars	Junior Scholars	Senior Scholars	Total Scholars	Scholarship Amount
Alverno	4	2	0	2	8	8,437
Beloit	3	2	5	3	13	14,625
Cardinal Stritch	4	1	1	1	7	7,313
Carroll	9	5	12	5	31	34,875
Carthage	0	5	1	2	8	8,996
Edgewood	3	1	5	1	10	10,124
Lakeland	1	0	2	1	4	4,500
Lawrence	10	14	11	8	43	47,650
Marian	1	1	1	1	4	3,937
Marquette	49	29	34	43	155	165,941
MSOE	12	14	16	5	47	51,375
Mount Mary	3	0	0	2	5	5,625
Northland	0	2	2	0	4	4,500
Ripon	10	6	5	8	29	32,625
St Norbert	14	23	19	10	66	73,125
Viterbo	1	0	5	4	10	10,686
Concordia	2	2	3	3	10	10,688
WI Lutheran	3	9	6	2	20	21,376
Maranatha Baptist	2	2	2	3	9	10,125
<b>Independent Total</b>	131	118	130	104	483	526,523

<b>Table IV</b>						
<b>ACADEMIC EXCELLENCE SCHOLARS ALL SECTORS 2002-2003 ACADEMIC YEAR</b>						
	Freshman Scholars	Sophomore Scholars	Junior Scholars	Senior Scholars	Total Scholars	Scholarship Amount
<b>UW</b>	641	591	554	558	2,344	2,554,878
<b>Technical</b>	17	4	2	1	24	20,590
<b>Independent</b>	131	118	130	104	483	526,523
<b>Grand Total</b>	789	713	686	663	2,851	3,101,991

Note: Tables III and IV show actual net spent amounts and the scholars with those net spent amounts.

<b>Table V</b>							
<b>ACADEMIC EXCELLENCE SCHOLARS RECEIVING STATE GRANTS</b>							
<b>UNIVERSITY OF WISCONSIN AND WISCONSIN TECHNICAL COLLEGE INSTITUTIONS</b>							
<b>2002-2003 ACADEMIC YEAR</b>							
	Total Scholars	Applied for Aid	State Aid Eligible	Average Contribution	Average AGI	State Aid Amount	HEAB AES Amount
Madison	1,492	690	103	1,045	19,749	124,542	1,657,125
Milwaukee	104	65	20	453	19,048	33,815	114,752
Green Bay	60	37	12	1,179	24,289	17,674	66,938
Parkside	19	12	7	793	11,357	9,148	20,250
Colleges	20	0	0	0	0	0	19,689
Eau Claire	144	74	11	649	12,603	17,173	159,751
LaCrosse	131	75	16	1,479	27,844	16,970	144,000
Oshkosh	68	37	12	927	21,599	13,896	74,813
Platteville	78	42	13	1,050	18,193	12,346	86,063
River Falls	55	33	7	1,093	24,371	8,143	59,625
Stevens Point	105	57	16	1,021	14,658	24,158	115,875
Stout	33	21	9	1,253	27,397	10,703	34,875
Superior	13	6	1	1,653	24,755	2,300	14,625
Whitewater	57	31	7	574	14,189	7,764	62,438
<b>UW Total</b>	<b>2,379</b>	<b>1,180</b>	<b>234</b>	<b>995</b>	<b>19,836</b>	<b>298,632</b>	<b>2,630,819</b>
<b>WTCS Total</b>	<b>32</b>	<b>20</b>	<b>14</b>	<b>1,141</b>	<b>24,426</b>	<b>12,606</b>	<b>34,875</b>

<b>Grand Total UW &amp; WTCS</b>	<b>2,411</b>	<b>1,200</b>	<b>248</b>	<b>1,004</b>	<b>20,095</b>	<b>311,238</b>	<b>2,665,694</b>
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Notes: Table V shows AES scholars and AES amounts awarded.

The final column is the amount that HEAB provided through the AES appropriation. The institutions matched this amount to fully fund the scholars.

<b>Table VI</b>							
<b>ACADEMIC EXCELLENCE SCHOLARS RECEIVING STATE GRANTS</b>							
<b>INDEPENDENT COLLEGES AND UNIVERSITIES</b>							
<b>2002-2003 ACADEMIC YEAR</b>							
	Total Scholars	Applied for Aid	State Aid Eligible	Average Contribution	Average AGI	State Aid Amount	HEAB AES Amount
Alverno	10	5	5	0	10,367	13,550	11,250
Beloit	13	12	9	5,313	41,445	21,150	14,625
Cardinal Stritch	7	5	4	708	19,489	12,600	7,875
Carroll	33	30	18	3,985	46,184	43,596	37,125
Carthage	8	4	4	4,369	31,174	9,119	9,000
Edgewood	10	10	3	4,079	40,319	5,021	10,125
Lakeland	4	3	3	1,044	32,855	7,050	4,500
Lawrence	43	26	25	4,700	45,029	58,225	48,375
Marian	4	2	2	3,088	43,896	6,100	3,937
Marquette	157	130	78	4,329	39,146	181,409	174,376
MSOE	48	31	30	4,141	39,807	67,895	52,875
Mount Mary	6	4	2	0	0	6,500	6,750
Northland	4	4	4	4,243	49,372	10,800	4,500
Ripon	30	26	20	4,860	44,512	49,828	33,750
St. Norbert	66	33	33	4,234	39,952	78,355	73,125
Viterbo	10	7	3	2,547	36,080	8,450	11,250
Concordia	11	5	5	5,641	59,393	11,750	12,375
WI Lutheran	22	13	10	4,780	43,025	23,500	24,188
Maranatha Baptist	9	9	6	1,645	28,861	15,239	10,125
<b>Total</b>	495	359	264	4,122	39,231	630,137	570,376

<b>Grand Total UW-WTCS-Indep.</b>	2,906	1,559	512	2,611	29,962	941,375	3,236,070
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Notes: Table VI shows AES scholars and AES amounts awarded.

The final column is the amount of AES that HEAB provided. The institutions matched this amount to fully fund the scholars.

<b>Table VII</b>				
<b>General Scholar Data</b>				
	1999-2000	2000-2001	2001-2002	2002-2003
Total Scholarships Available	3324	3373	3407	3445
Total Scholars Enrolled In-State	2723	2670	3054	2851
Total Freshman Scholarships Available	847	861	861	876
Scholars Enrolled as Freshmen	699	766	781	794
Alternate Scholarship Recipients	69	148	162	160
% of Eligible Freshmen Enrolled In-State	83%	89%	91%	91%

<b>Table VIII</b>	
<b>Preliminary Data – 2003-2004 Freshman Scholars as of July 28, 2003</b>	
Total Scholarships Available	881
Alternate Scholarships (of 876 Available Scholarships)	102
Total Scholars Enrolled in Wisconsin Institutions	686
Percentage of Scholars Enrolled in Wisconsin Institutions	78%
Scholars Enrolled in UW System Institutions	565
Scholars Enrolled in Independent Colleges	106
Scholars Enrolled in WTCS Institutions	11
Scholars Enrolled in Non-Wisconsin Institutions	159
Scholars Who Have Not Yet Specified Which College	138